

Guide

Navigating the RFP process and its alternatives

A quick guide for public sector agencies considering impact management software





Procuring software can be a long, often challenging, process. It is typically assumed that a request for proposal (RFP) is required to purchase an impact management solution to support your organization, but this is not necessarily the case. While there are some instances when an RFP is a concrete requirement, in many cases it depends on the cost or type of solution you're purchasing. Additionally, there are many alternative procurement paths such as state-negotiated or state-approved software contract vehicles to simplify and expedite the process.

In this quick guide, we walk through the basics of the RFP process, how to determine if your organization must complete an RFP to secure impact management software, and how Bonterra can help you navigate the RFP process and its alternatives.

RFP 101

What is an RFP? An RFP allows an agency to outline the type of software they are looking for, how they will use it, and solicit bids from companies to fulfill their needs.



What are the typical steps of the RFP process?

- 1. Planning:**
Before kicking off RFP development, it's important to determine your budget, consult key stakeholders to ensure you include the correct information in the document, establish a timeline, and do your research on potential technology solutions.
- 2. RFP development:**
Work with your team to develop the RFP document, which includes your top challenges, important features you're looking for, and key questions you want each potential vendor to answer.
- 3. Issuing the RFP:**
Once your RFP is in a good place, issue it to the vendors you would like to receive proposals from along with the timeline you're working against.
- 4. Waiting and answering questions:**
Field any follow-up questions from potential vendors and prepare to review proposals.
- 5. Evaluating proposals:**
Gather key stakeholders to review and rate proposals. If you find that there is not a clear winner, send follow-up questions or even schedule presentations for vendors to dive deeper into their solution.
- 6. Reevaluate:**
If you require a second round of information from potential vendors, take the time to reevaluate and choose the winner.
- 7. Secure final approval:**
Present the winner to final decision-makers and get approval to move forward.
- 8. Negotiate the contract:**
Work with the vendor to secure a contract and ensure it meets your organization's needs and budget requirements.
- 9. Implementation:**
Schedule implementation and training to onboard key staff members.
- 10. Follow-up:**
Notify vendors that you did not choose and save documentation of your RFP process for future reference.

Who should be involved in the RFP process?

Typically, your organization will have a procurement or IT representative who might help guide the RFP process. They should know definitively if your organization requires an RFP or not based on the type of solution you're interested in.

How long is a typical RFP document and how long does the process take?

An RFP can vary from 20 to 200 pages and can be a lengthy time commitment for staff to create, administer, and evaluate. The entire process — from creating the document to evaluating the bids — can take months. Due to the length of the process, it's possible that you may face delays in implementing a solution to support your day-to-day work.



Does my organization need an RFP? Four considerations:

1. Staff and partners:

If possible, identify the right staff and partners, such as IT and procurement representatives, to support your software procurement process. These stakeholders may help you decide if you need an RFP or not and how to make the RFP process as simple as possible.

Key question to ask:

Who at my agency knows what our software procurement requirements are and can definitively say whether we must go RFP or can take an alternative path?

2. Cost:

Be mindful of the cost of the solution you're considering. For example, some government agencies have a cost or budget threshold, so any software costing more than \$30,000 per year might require an RFP while software costing less than \$30,000 per year might not.

Key question to ask:

Is an RFP required for any budget threshold or is there a certain threshold where an RFP is not required?

3. Custom-built vs. customizable solutions:

Custom-built solutions often require an RFP because they are built from scratch using coding. Customizable out-of-the-box solutions, like Bonterra Impact Management, offer comprehensive pre-built features so you can easily customize your software to your organization's unique needs. Customizable solutions often do not require an RFP.

Key question to ask:

At my organization, is an RFP required for a customizable out-of-the-box solution?

4. Available alternative procurement paths:

Depending on the state you're in, there are many alternative procurement paths your agency can take to avoid the RFP process. For example, Bonterra is approved to sell on several state-negotiated and state-approved software contract vehicles such as SHI or CDW-G, among others. These universal software contracts have been vetted at the highest level in many states, allowing organizations across the state to avoid the RFP process and secure software faster.

Key question to ask:

Will having a state-negotiated or state-approved contract vehicle (i.e. NASPO VAR/S-VAR or OMNIA partners through SHI or CDW-G) allow us to avoid the RFP requirement?

Examples of Bonterra procurement partners

National co-ops:



State and local co-ops:



Resellers:



Work with Bonterra to simplify the RFP process

Bonterra can help you simplify the RFP process for securing impact management software, either by avoiding it all together, or helping you navigate the process. We have multiple state approved alternative procurement paths, plus we can work with your team to determine if an RFP is necessary or not.

- **Schedule a free consultation:**
Our experts have helped hundreds of public agencies successfully navigate the RFP process, and in many cases avoid it all together to secure impact management software. We'll help you understand your organization's needs, work with the right staff members to determine if an RFP is necessary, and if so, support you in crafting an RFP to help you secure the best solution for your organization.
- **Schedule an RFP working session:**
We frequently help our other public sector partners develop RFPs to expedite this lengthy process and implement an impact management solution faster. More importantly, we have years of public sector experience and expertise to help you ask for the right software requirements so you can secure the best solution for your organization's needs.

Schedule a consultation today!

Work with Bonterra to simplify the RFP process — [Fill out our request a demo form](#) to schedule a consultation.



Interested in learning more about Bonterra Impact Management?

Download our [Impact Management Buyer's Guide](#).